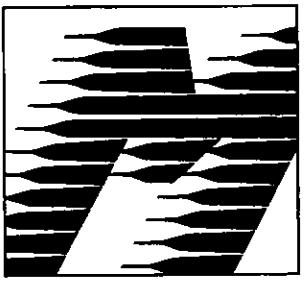
Research Information Systems



REFERENCEMANAGER™

Demonstration Program

Reference Manager Version 6

for the
Microsoft® Windows™
Operating System

Thank you for requesting this Reference Manager™ demonstration program for personal computers running the Windows™ operating system

This booklet describes the capabilities of Reference Manager and contains a short tutorial to introduce you to the main features of the program. This demonstration program is a full-featured copy of the Professional Edition of Reference Manager for Windows, limiting only the maximum number of accesses to a database. If you have any questions about using the program, or to order the Professional Edition, please feel free to contact any member of our Marketing department at the address or phone number on the back cover of this instruction guide.

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About Reference Manager

Reference Manager is a personal reference management (bibliographic retrieval) system, designed by a research scientist who actively follows and contributes to the scientific literature. Its wide range of features eases the many burdensome and frustrating tasks associated with preparing a scientific publication.

You can enter references into a Reference Manager database by typing them at the keyboard, from files downloaded from a variety of CD-ROM or on-line services, or from computerized current-awareness services such as Reference Update (also available from Research Information Systems). Reference Manager makes it easy to organize this bibliographic information. In combination with your word processor, Reference Manager generates bibliographies formatted in virtually any journal style, while incorporating the appropriate reference citations into your manuscripts.

About the demonstration program

The demonstration program is a full-featured Reference Manager program. It has the single limitation that it allows access to a database for a total of 50 sessions (further access to this data is available with the purchase of a Reference Manager package). Included is a sample database of several hundred references, including keywords and some abstracts. You can enter references, retrieve and edit them, print them in a variety of formats, create or edit journal formats for bibliography generation, and generate bibliographies. Also included is the Capture module.

Capture allows you to import references downloaded from on-line or CD-ROM database services into the database. Included with this demonstration program are the Capture definitions and sample files. Please see the enclosed Capture module listing for an up-to-date list of all supported Capture formats. The Capture definitions in the demonstration program are updated regularly. However, it is possible that a specific vendor may change their format between the time your demonstration program was manufactured and the time that you import from a file downloaded from that vendor. If you have any questions or experience any problems, please call our Marketing department for assistance.

Reference Manager is easy to use. You can begin entering references and creating bibliographies in just a few minutes. The information you need to get started is included here.

Installation Instructions

The Reference Manager demonstration program for the Windows™ operating system is delivered on two high-density 3½" disks. To run this program, you need a computer with at least one 3½" floppy drive, a hard drive, at least 2 MB of available RAM, Microsoft® Windows™ 3.1, and DOS version 3.3 or higher. The program requires 5 MB of space on your hard disk. Following are the instructions for installing the demonstration program.

Configuring your computer

We recommend that you also install SHARE.EXE on your computer. Installing this program when you use the Windows™ operating system prevents the possibility of simultaneously accessing an open file from two separate applications. SHARE.EXE is included with most versions of DOS.

Installing on your hard disk

The installation program creates a Program Group called "Reference Manager for Windows" and creates the program icon, titled "WinRM 6 Demo." This procedure assumes that you are installing from the A: drive and that Reference Manager will reside in a subdirectory called C:\WRM6DEMO. Change the following commands to match your actual setup.

To begin installing Reference Manager, you must first execute Windows™. Then, follow these steps to install the demonstration program.

1. Insert the Reference Manager for Windows Demonstration Disk 1 into drive A: and choose Run from the Program Manager File menu in Windows. When the RUN window appears, type **a:install** and click **OK**. Wait a moment while the install program

is being loaded. You are then prompted to select the language in which you want to use Reference Manager — English or French.

2. The installation program prompts you to enter the destination directory, where you want to install the demonstration program. Click **OK** if you want to install the program in the recommended directory (C:\WRM6DEMO), or enter another directory name and click **OK**.

3. Continue to enter information as requested, inserting the second disk when the install program prompts you.

4. When the install program has successfully completed, it creates the Windows Program Group and icon for the Reference Manager for Windows demonstration program.

That's all there is to it! Your installation is now complete. To begin using Reference Manager, just double-click the program icon.

Using the Demonstration Program

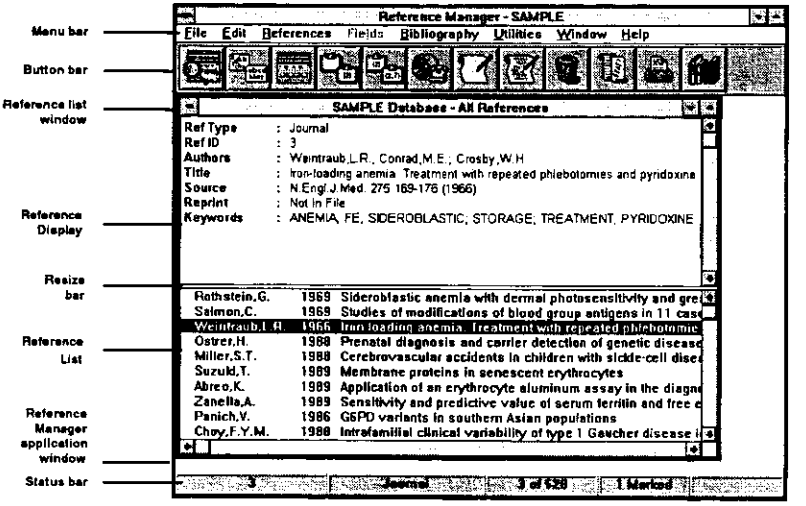
Reference Manager is easy to use. Taking full advantage of the graphical user interface provided by Windows, you can access all program functions simply by choosing an option on a pull-down menu or by clicking a button. You can also access complete on-line help at any time by clicking **Help** or pressing [F1].

The following sections guide you, step-by-step, through most of the procedures you will use when operating Reference Manager. Included are instructions for:

- Starting Reference Manager
- Entering references from the keyboard
- Importing references downloaded from a database service
- Retrieving references
- Preparing a bibliography from a manuscript

Getting Started

If you are not at Reference Manager's main window, start the program. To do so, double-click the program icon. An initial screen appears briefly, then the main window, as shown in the following illustration:


Menu bar
Button bar
Reference list window
Reference Display
Resize bar
Reference List
Reference Manager application window
Status bar
Reference Manager - SAMPLE
File Edit References Fields Bibliography Utilities Window Help
SAMPLE Database - All References
Ref Type : Journal
Ref ID : 3
Authors : Weintraub,L.R., Conrad,M.E., Crosby,W.H
Title : Iron-loading anemia. Treatment with repeated phlebotomies and pyridoxine
Source : N.Engl.J.Med. 275 169-176 (1966)
Reprint : Not In File
Keywords : ANEMIA, FE, SIDEROBLASTIC; STORAGE; TREATMENT, PYRIDOXINE
Rothstein,G. 1969 Sideroblastic anemia with dermal photosensitivity and gre
Salmon,C. 1969 Studies of modifications of blood group antigens in 11 cas
Weintraub,L.R. 1966 Iron loading anemia. Treatment with repeated phlebotomie
Ostrer,H. 1988 Prenatal diagnosis and carrier detection of genetic disease
Miller,S.T. 1988 Cerebrovascular accidents in children with sickle-cell dise
Suzuki,T. 1989 Membrane proteins in senescent erythrocytes
Abreo,K. 1989 Application of an erythrocyte aluminum assay in the diagn
Zanella,A. 1989 Sensitivity and predictive value of serum ferritin and free e
Panich,V. 1986 G6PD variants in southern Asian populations
Choy,F.Y.M. 1988 Intrafamilial clinical variability of type 1 Gaucher disease
3
Journal
3 of 520
1 Marked

The Sample Database is automatically displayed when you launch the demonstration program. If the Sample Database is not displayed, you can open it by choosing Open Database from the File menu and then selecting the Sample database that is located in the demonstration program directory. If you want another database to be opened automatically each time you launch the program, specify a default database in Systems Settings from the Utilities menu.

The menus and buttons

Reference Manager is as simple to use as Windows. You can select options from pull-down menus or by clicking a button in the button bar. You can click on buttons or checkboxes to perform special functions in windows and dialog boxes. To accept your choices, or to begin a process, you choose **OK**. To cancel a process, you choose **Cancel**. To choose a button, use the mouse to "click" on it.

The Reference List Window Split Screen

The Reference List Window is a split screen that is divided into several parts. Located in the lower portion of the window, the Reference List is a scrollable list of the references in the open database. The top portion, or pane, of the window is the Reference Display which contains the full text of the reference that is highlighted in the Reference List.

Located at the very bottom of the application window is the status bar. The status bar is a tool to provide you with more information. The status bar shows the reference ID of the currently selected reference, what type of reference it is and where in the sequence of this retrieval it is located. Also shown is the number of marked references and the name of the currently open transfer index, if any. When you click and hold a button in the button bar or over a menu item, information on that button or menu option is displayed in the status bar.

When the Reference List Window is displayed as a split screen, you can resize the two panes to any size you want (resize the panes using the resize bar, just as you do for many other Windows applications).

Entering references from the keyboard

You can enter over 30 different types of references: journals, books, conference proceedings, patents, slides, theses, and many others. Actual entry of a reference is similar for each of the types, but since journal references are the most commonly cited by scientific investigators, we'll use one as an example. To begin, choose New from the References menu. The Reference Edit window appears briefly followed by the Ref Type browse list.

Choose the type of reference you want to enter (for this example, choose "Journal") by moving the highlight and clicking **OK** (or pressing [Enter]). The Authors Edit dialog box appears.

During reference entry, clicking **Next** or **OK** saves the information you entered and displays the next Edit dialog box (for example, if you are entering the authors for a journal reference, clicking **Next** displays the Title Edit dialog box).

Entering authors' names

Entering authors' names is easy. You can enter up to 255 different authors for each reference, and each author's name can be up to 255 characters.

Enter the last name first, followed by a comma, then the first and middle initials (separated by periods) or full names. It is important to always enter author's names in the same format. (To find out how to more about entering authors' names, click **Help** to access the on-line help.) This strict form of entry provides Reference Manager with great flexibility for its various output formats.

Enter each author on a separate line, pressing [Tab] to move to the next line. If an author is new to the database, an asterisk appears in front of the name. When you save the reference, the authors are automatically added to the database.

Using one of Reference Manager's most powerful features — the ability to examine a list of existing authors' names — you can browse for an author's name. Simply type all or part of the name and click **Browse**. The Authors Browse list appears and the name closest to the one you typed is highlighted. Scroll through the list with the up/down arrow or [PgUp] and [PgDn] keys. Highlight the author name that you want and press [Enter] to insert it into the Authors Edit dialog box.

Take a few minutes to experiment with the other buttons available in the Authors Edit dialog box. You will find them useful when entering references. You can edit names at any time, and delete or insert names.

When you have finished entering all authors' names, click **Next** or **OK** to save the information you entered into the Authors Edit dialog box and display the Titles Edit dialog box.

Entering titles

You can enter titles, up to 16K in length, into Reference Manager. Type the title using Reference Manager's mini-word processor. Do not put a period at the end of the title; Reference Manager automatically inserts the appropriate punctuation into your bibliographies.

You can use the mouse or arrow keys to change the position of the cursor as desired, and you can use the special function keys listed in Table 1. Additional text formatting is achieved with the use of the text attribute control codes listed in Table 2.

When you have finished entering the title, click **Next** or **OK** to save the information you entered into the Titles Edit dialog box and display the Miscellaneous Edit dialog box.

Table 1. Special Function Keys

Key	Effect in Text Entry
[Backspace]	Backspace, delete left of cursor
↑	Move up a line
↓	Move down a line
→	Move right a character
[Ctrl] →	Jump to start of next word
←	Move left a character
[Ctrl] ←	Jump to start of previous word
[Home]	Jump to start of line
[Ctrl] [Home]	Go to start of text block
[End]	Jump to end of line
[Ctrl] [End]	Go to end of text block
[Del]	Delete character at cursor

Text formatting control codes. You can use the characters shown in Table 2 to underline, boldface or italicize text, and to produce superscripts, subscripts and Greek characters. To use a keystroke combination, for example [Ctrl] [B], press and hold down [Ctrl] while you type [B]. You can specify the text format, type the text, and then turn the text formatting off (by entering the keystroke combination again). You can also type the text, highlight it and specify the text format.

Table 2. Text Attribute Control Codes

Key	Effect in Text Entry
[Ctrl] [U]	Underline
[Ctrl] [B]	Boldface
[Ctrl] [P]	Superscript
[Ctrl] [S]	Subscript
[Ctrl] [I]	Italics
[Ctrl] [G]	Greek

Using title words as keywords. Reference Manager can automatically scan the title (and the notes) after they have been entered and saved, and place any word matching an existing keyword into the keyword list for this reference (if you have "Auto keyword scan of titles and notes" checked in System Settings).

Entering miscellaneous information

You are now ready to enter other information regarding the journal reference, such as the reference identification, journal name, year of publication, volume, issue, page numbers, reprint status, and so on. This information is entered into the Miscellaneous Edit dialog box.

Notice that the cursor is at the second field, Journal Name. Reference Manager automatically assigns reference IDs, unless you specify otherwise in System Settings. Therefore, the next available reference ID has automatically been assigned. For this lesson, the reference ID that has been assigned is acceptable. (To learn more about using your own reference IDs, click **Help** or press [F1] to display the on-line help.)

Journal Name. Type in the journal name — either the full name, standard abbreviation, or an abbreviation of your choice (see "Periodical synonyms" below). Put spaces only after complete words; put periods only after abbreviated words.

Periodical synonyms. A maximum of four different names (called periodical synonyms) can be used to identify each periodical; Reference Manager selects the appropriate name or abbreviation for use in bibliographies. When you enter the name of a new periodical

in the Miscellaneous Edit dialog box, it is automatically added to the list of periodicals. When you enter a name that contains only whole words, that name is entered as the full periodical name. When you enter a name that contains periods, that name is entered as the standard abbreviation.

Biomedical researchers usually use the standard *Index Medicus* abbreviation for journals. However, if you plan to be generating bibliographies in which the full periodical name must appear, then you must enter the full periodical name. Periodical names are edited using the Periodical Synonym Edit option in the Utilities menu.

Pub Date, Volume, Issue, Start Page, End Page. You can enter the information as desired into these fields. (Notice that the publication year automatically defaults to the current year, as set in your computer system.) If any information is incorrect, you can easily change it. If you aren't sure of the information for any of these fields, you can just leave the field blank.

Reprint Status. Reference Manager helps you keep track of the status of reprints you have requested for your files. For each reference, you can specify whether the reprint is "In File," "Not In File," or "On Request." If you select "On Request," you can also enter the date on which the reprint was requested. Use this date later to retrieve references for which reprint requests are still pending.

Availability. This field can be used to specify where an article or tape is located, when you are expecting a reprint or copy, or other information.

User Def (1-5). These fields can be used to enter any other information about the reference that you desire.

When you have finished entering the miscellaneous information for this reference, click **Next** or **OK** to save this information and display the Notes Edit dialog box.

Entering notes

You can enter notes, up to 16K in length, into Reference Manager. Notes may contain any information you need, such as short reminders to yourself. You can use the features of the built-in word processor as shown in Table 1 (page 9), and the special text attribute

keys in Table 2 (page 10). The automatic keyword scan works on the notes as well as on the title.

When you have finished entering the notes, click **Next** or **OK** to save this information and display the Abstract Edit dialog box.

Entering the abstract

Entering abstracts is similar to entering notes. When you have finished typing in the abstract, click **Next** or **OK** to save this information and display the Keywords Edit dialog box.

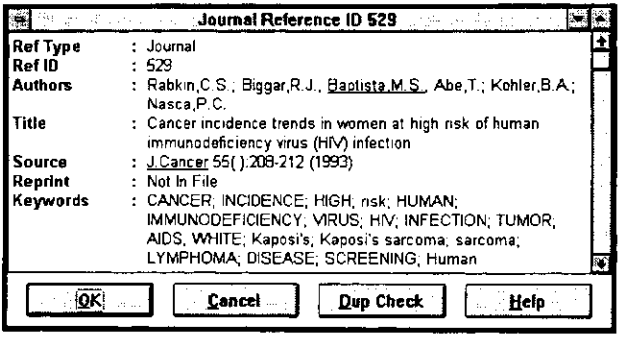
Entering keywords

Keywords are used to help you retrieve the references that you are interested in, quickly and efficiently. You can enter the keywords for each reference manually. In addition, if you have the "Automatic keyword scan of title and notes" option checked in System Settings, Reference Manager automatically scans the title and notes (after they have been typed in and saved) and places any word matching an existing keyword into this reference's keywords list. As with authors, an asterisk marks a keyword that is new to the database. The buttons on the Keywords Edit dialog box are the same as those on the Authors Edit dialog box. You can also search for keywords in the database by clicking **Browse**. The Keywords Browse list appears.

When you have finished entering all keywords, click **Next** or **OK** to save the information entered into this dialog box and, since this is the last field Edit dialog box, to display the Reference Edit window. The Reference Edit window allows you to review the information you entered to ensure its accuracy before you save the reference.

Final editing

Before you add each reference to your database, you can review, and make changes to, the information displayed in the Reference Edit window. Remember that any information that is underlined indicates that this information (authors, keywords or journals) is new to the database.


Journal Reference ID 529
Ref Type : Journal
Ref ID : 529
Authors : Rabkin,C.S.; Biggar,R.J., Baptista,M.S., Abe,T.; Kohler,B.A.; Nasca,P.C.
Title : Cancer incidence trends in women at high risk of human immunodeficiency virus (HIV) infection
Source : J.Cancer 55( ):208-212 (1993)
Reprint : Not In File
Keywords : CANCER; INCIDENCE; HIGH; risk; HUMAN; IMMUNODEFICIENCY; VIRUS; HIV; INFECTION; TUMOR; AIDS; WHITE; Kaposi's; Kaposi's sarcoma; sarcoma; LYMPHOMA; DISEASE; SCREENING; Human
OK
Cancel
Dup Check
Help

If you want to change information in any of the fields in the Reference Edit window, simply move the cursor over the field you want changed — the cursor changes to a pen (✎) — and double-click the mouse button (or choose the field from the Fields menu). The dialog box for the field you selected appears allowing you to make any changes. Click **OK** to save the changes and return to the Reference Edit window.

Another useful option is available in the Reference Edit window. When you click **Dup Check**, Reference Manager compares the current reference with references that are already in the database. If it finds a duplicate reference, a message appears that a possible duplicate is found. Click **OK** to continue, or **View Dup** if you want to view the duplicate reference. After comparing the references, click **OK** in the Reference Edit window for the new reference to save the new reference, or click **Cancel**.

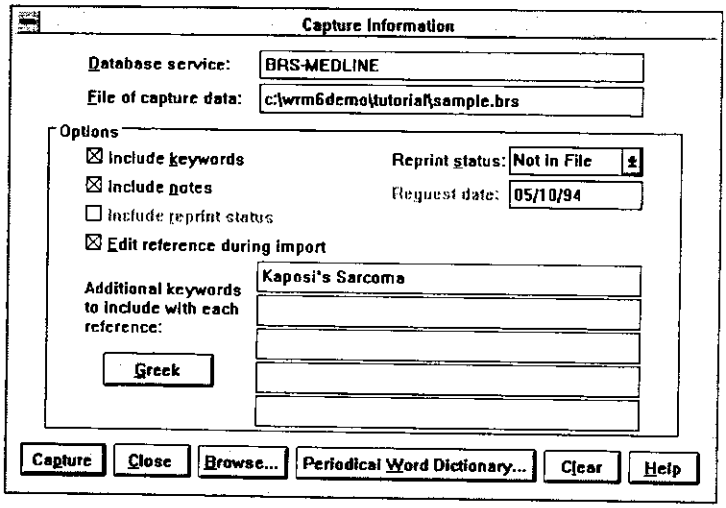
When you are ready to save the new reference, click **OK**. (If you have automatic duplicate checking turned on in System Settings from the Utilities menu, Reference Manager also performs a duplicate check when you click **OK** to save the reference.) Any new keywords, author names or journal names are automatically entered into the database when you click **OK**.

Importing References (Capture)

Another way to build your database is by importing references you have downloaded from on-line or CD-ROM services such as MEDLARS or SilverPlatter. In addition, you can import references

from a text file (for example, a bibliography in WordPerfect), although the information in these files must be converted to a structure which Capture can import.

To show you how Capture works, you can import references using a sample from the MEDLINE database, which has been downloaded from BRS Colleague. The sample file, called "SAMPLE.BRS" is included with this demonstration program and was installed along with the program. To begin importing the references in it, choose Capture from the References menu. The Capture Information dialog box appears.



Database service. This is the name of the database service from which you downloaded references. Just as when you entered authors' names and keywords for the reference you added in the previous section, a Browse dialog box is available to select the database service. If you are unsure what the name of the on-line database service is, you can search for it. Be sure the cursor is in the text box for this field and click **Browse**. The Database Service dialog box appears. Move the highlight to the Capture Definition "BRS-MEDLINE" and click **OK**. You can press [Tab] to move to the next field.

File of capture data. This field informs Reference Manager where to find the file containing the references to be imported. Click inside this text box (if your cursor is not already there) and type in the path

and name of the text file you want to import. You can also search for the text file by clicking **Browse** to display the File of Capture Data dialog box. Type in, or select, the file named SAMPLE.BRS that is located in the TUTORIAL subdirectory of the program directory (\WRM6DEMO\TUTORIAL\SAMPLE.BRS).

Options

You can choose whether to include the keywords and notes with all references that are being imported. You can specify whether all references are to have the reprint status as "In File," "Not In File," or "On Request." You can also choose to edit each reference as it is being imported into the database. For this example, choose to edit the references during import.

Additional keywords to include

You have the option of adding your own keywords to all references being imported into the database from this file. Enter the keywords exactly as if you were manually entering references into the database. You can enter up to five keywords that will be assigned automatically to every reference.

You can click **Browse** to view all keywords that are already in the database. In addition, if you have the option checked in System Settings, Reference Manager automatically scans titles and notes for keywords as the references are being imported.

When all information has been entered into the Capture Information dialog box, click **Capture** to begin importing the references.

Editing references during import

When you click **Capture**, the Import Progress screen appears briefly. Then the first reference appears on the screen, ready to be added to your database or to be edited. The procedure for editing the reference is the same as when you enter a reference from the keyboard. For example, if you want to edit the keyword list before adding this reference to the database, move the cursor over the field and double-click. The Keywords Edit dialog box appears allowing you to add, delete, or change the keywords for this reference. Click

OK to return to the Reference Edit window, and then click **OK** again to save the reference and begin importing the next reference. If you do not want to import the displayed reference, click **Omit** to skip that reference and go to the next.

Duplicate checking during import

When you set Reference Manager's System Settings to perform automatic duplicate reference checking, the program always checks for duplicate references while you are importing with the Capture module.

If you select to edit references during import, the new references are compared with existing references in your database. If a duplicate reference is found, the "Possible duplicate reference found" dialog box appears. This dialog box displays the reference that is currently in the database. You can scroll through the reference to verify whether the references are the same. Click **OK** to remove the "Possible duplicate reference found" dialog box, then click **OK** if you want to import the reference, or **Omit** if you want to skip the reference.

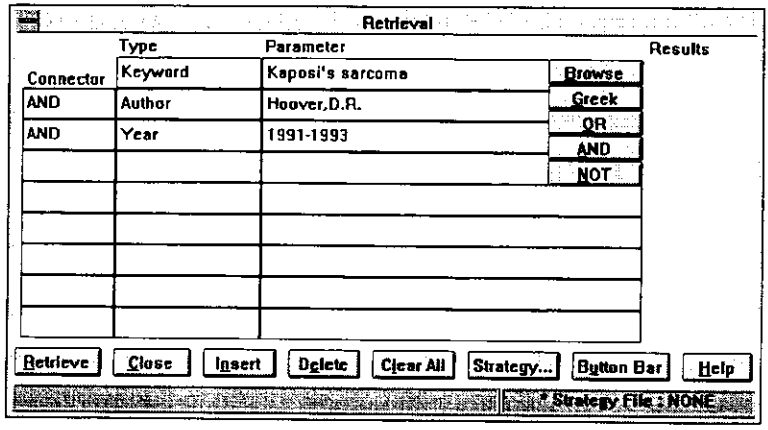
If you are importing references in batch mode (without editing during import), suspected duplicates are not imported, but instead are put into a text file (in RIS format with the file extension ".DUP") which you can later review or import.

If you did not customize for automatic duplicate checking, you can still check each reference if you choose to edit during import and click **Dup Check** for each reference as it is being imported.

Retrieving References

Now that you have learned how to add references from the keyboard and by importing a text file, you are ready to retrieve references. References are retrieved by searching the database based on the criteria you select, such as by an author's name or by a keyword.

To begin the retrieval process, choose Retrieve from the References menu. The Retrieval dialog box appears.



Search strategies are entered in three columns: logical connector, parameter type, and search parameter. Move to the next (or previous) field with the mouse or the [Tab] (or [Shift] [Tab]) keys. Buttons at the bottom of the Retrieval dialog box allow you to insert a search line, delete a search line or clear the Retrieval dialog box. Clicking **Strategy** allows you to save, load or delete a search strategy while clicking **Button Bar** displays or hides the Button Bar. At any time during search strategy entry, clicking **Retrieve** starts the retrieval.

Type

You can search the database by an author's name, keyword, periodical name, year of publication, title, document type, pending reprint, reprint status, transfer index, reference ID, or all other fields. Select the parameter by choosing it from the Button Bar, or by typing the underlined letter in its name.

Parameter

This is the parameter upon which the search line is to be based. You can type text, or search for text by clicking **Browse** (available on the Button Bar) or pressing [F3]. A wild card character, the asterisk (*), can be used when retrieving by author, periodical or keyword.

You can also search for a range of numbers (in the publication year or reference ID fields) by inserting a hyphen between parameters. For example, if you want to search for all references occurring between the years of 1985 to 1989 you would enter the parameter value as "1985-1989".

Connector

Whenever you have more than one parameter in a search strategy, you must choose a logical connector (AND, OR, NOT) to define the relationship between the parameters. Click in the text box for Connector and type the letter corresponding to the underlined letter of the connector as displayed in the Button Bar (or select the connector in the Button Bar using the mouse).

AND. This connector finds references in which both A *and* B appear. It does not find references containing only A or B. AND is useful for narrowing your retrieval results to only those references in which you are interested.

OR. This connector finds references in which A *or* B appear. It also finds references containing both A and B. OR is useful for finding references pertaining to several topics of interest.

NOT. This connector eliminates specific references from your retrieval. For example, the NOT connector finds references containing A but *not* B.

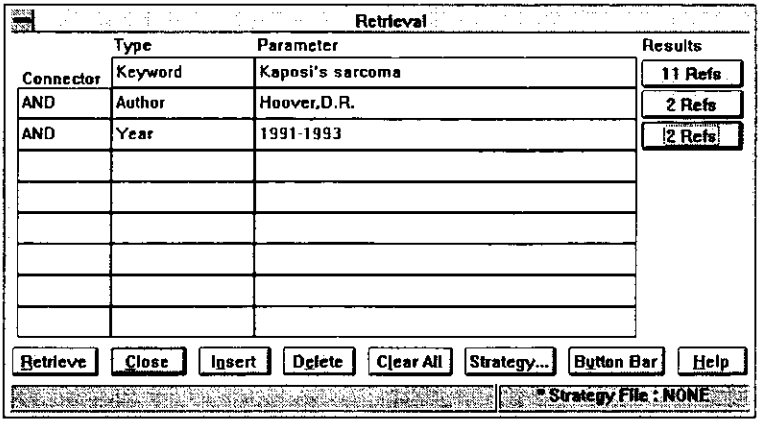
Combining logical connectors. You can use the logical connectors to include/exclude specific parameters on the same search line. For example, if you want to retrieve all references written by E. Beutler *or* B. Beutler, you can enter the name of the first author (by typing in the name or using **Browse**). Then, while still on the same line, click OR in the Button Bar. Notice that brackets now surround the first name, and the logical connector OR has been added with an empty pair of brackets. Complete the search line by entering the name of the last author between the empty pair of brackets.

The Retrieval Results sets

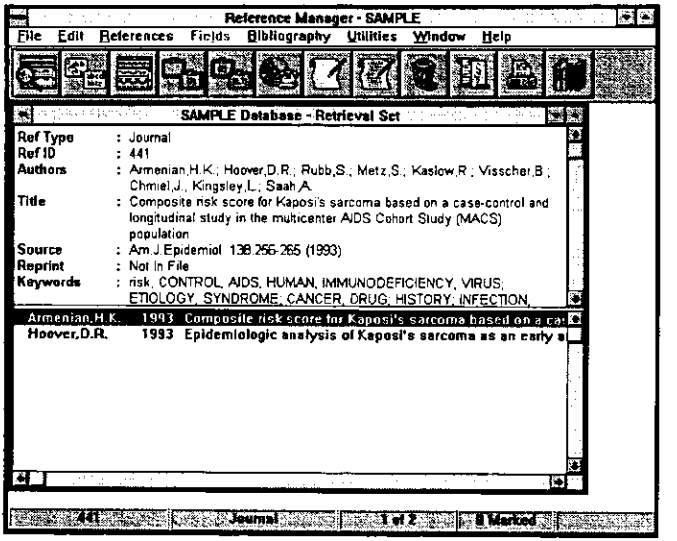
The search begins the moment you click **Retrieve**. Although most searches are completed quickly, certain combinations of parameters may take longer. Reference Manager displays retrieval results as the search is conducted (notice the buttons that appear to the right of the screen under the "Results" heading). To stop a retrieval at any time, click **Cancel**.

If only a single parameter is entered for a search, all references found are displayed automatically in the Reference List window.

If more than one parameter is entered, the results (the number of references that were retrieved by each line) of your search strategy are displayed in a button to the right of each search line.



Click this button to select and view any of the intermediate result sets as well as the final retrieval result. (To view another results set, choose Retrieve from the References menu and click a different Results button. If you open another database, choose Revert to All, or perform a batch duplicate check, the retrieval results are cleared and you will need to perform the retrieval again.) The following example is the Retrieval Set for the two references that contained the keyword "Kaposi's Sarcoma" and that were published by D.R. Hoover between 1991 and 1993 (as shown in the previous screen).


Reference Manager - SAMPLE
File Edit References Fields Bibliography Utilities Window Help
SAMPLE Database - Retrieval Set
Ref Type : Journal
Ref ID : 441
Authors : Armenian,H.K.; Hoover,D.R.; Rubb,S.; Metz,S.; Kaslow,R.; Visscher,B.; Chmiel,J.; Kingsley,L.; Saah,A.
Title : Composite risk score for Kaposi's sarcoma based on a case-control and longitudinal study in the multicenter AIDS Cohort Study (MACS) population
Source : Am J Epidemiol 138:256-265 (1993)
Reprint : Not In File
Keywords : risk, CONTROL, AIDS, HUMAN, IMMUNODEFICIENCY, VIRUS; ETIOLOGY, SYNDROME, CANCER, DRUG; HISTORY; INFECTION,
Armenian,H.K. 1993 Composite risk score for Kaposi's sarcoma based on a ca
Hoover,D.R. 1993 Epidemiologic analysis of Kaposi's sarcoma as an early a
441
Journal
1 of 2
0 Marked

Sort

You can sort the contents of a retrieval set, or sort the entire database displayed in the Reference List window. You can sort by publication year (descending or ascending), author name, or reference ID. To sort references, choose Sort Result from the References menu. The Sort Criterion Menu dialog box is displayed to allow you to select the sort option.

Mark

References that are displayed in the Reference List can be tagged, or "marked." Marked references can be deleted, printed, assigned keywords or placed into a transfer index. There are several ways you can mark a reference. You can select the reference using the secondary mouse button. You can select the reference and press the spacebar or choose Toggle Mark from the Edit menu. Or you can choose Mark All from the Edit menu. References that are marked are displayed with an arrow to the left of the authors' name (▶). This option is a toggle; to unmark an already-marked reference, just mark it again.

Transfer

Transfer indexes are a means of grouping arbitrary sets of references. Once created, a transfer index is a source for operations such as printing a bibliography from the references it contains, or merging all references from a transfer index into another database. Only one transfer index can be open or active at a time. You can place marked references into a transfer index by making a transfer index active, and then choosing Transfer from the References menu. The Retrieval Transfer dialog box appears allowing you to select to transfer marked references, unmarked references, or all references.

Delete

If you decide you want to delete a reference (or references), you can do so easily. Choosing Delete from the References menu displays the Delete dialog box. You can select to delete the highlighted reference only, the marked reference(s) only, the unmarked reference(s), or all references.

Print

You can print a bibliography of the references that are displayed, or marked, in the Reference List window (this can be the entire reference list, or a subset of the reference list based upon a retrieval you performed). To print the bibliography, choose Print from the File menu. The Bibliography Information dialog box appears to allow you to select the bibliography options.

Generating a Bibliography From a Manuscript

One of the most powerful features of Reference Manager is its ability to generate a bibliography directly from your manuscript, and to format it for the journal you select. It renumbers or alphabetizes the citations according to the journal publisher's specifications.

Now you can see how easy it is. The following instructions detail how to generate a bibliography in the *Science* format from a manuscript in your word processor.

Viewing the sample manuscript

Provided with this demonstration program are several manuscript files containing the same document, in the formats of the word processors supported by Reference Manager. The files and corresponding word processors are listed below.

AMIPRO.SAM	Ami Pro document
ASCII.DOC	ASCII text file
PERF42.DOC	WordPerfect 4.2 document
PERF5.DOC	WordPerfect 5.0 or 5.1 document (also WordPerfect for Windows™)
PERF6.DOC	WordPerfect 6.0 document
WINWORD2.DOC	Word for Windows 1/2 document
WINWORD6.DOC	Word for Windows 6 document
WORD4.DOC	Microsoft Word 4.x document
WORD5.DOC	Microsoft Word 5.x document
WORDSTAR.DOC	WordStar Version 6 document
XYWRITE.DOC	XyWrite document

Switch to your word processor and load the appropriate file into your word processor. Save the document you load as SAMPLE.DOC. (If your word processor is not included in the list of sample documents, use the ASCII.DOC file.)

When you view the sample manuscript, you will notice that citations are placed in curved brackets, and that the citation numbers actually refer to the reference ID's in the Reference Manager Sample database.

Pasting references into the sample manuscript

Now you will see just how easy it is to insert citations into a manuscript. Switch back to Reference Manager. If you want you can perform a retrieval to display a selected set of references.

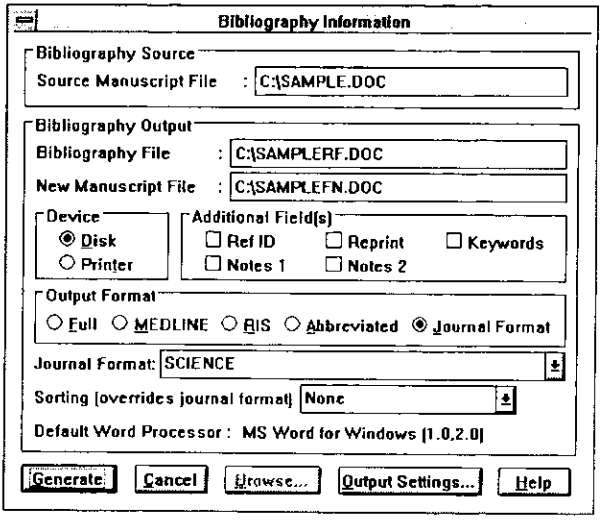
Copying reference IDs. Select one reference you want to cite by marking it. Then copy its reference ID by choosing Copy Reference IDs from the Edit menu. If you choose View Clipboard from the Edit menu, you will see the reference ID that was copied there.

Appending reference IDs. Mark another reference you want to cite and append it to the previous reference ID. You do this by selecting the reference and choosing Append Reference IDs from the Edit menu. If you choose View Clipboard again, you will see the second reference has been added.

Pasting reference IDs. Now switch back to your word processor and the sample manuscript. Position the cursor where you want to insert the citations and choose Paste from the Edit menu (many Windows applications allow you to use the keyboard shortcut [Ctrl] [V] when pasting). Notice that the reference IDs are pasted into the text along with the default starting and ending delimiters (these can be changed by choosing Output Settings from the Utilities menu).

Generating the bibliography

Once your manuscript has been prepared, save and close the document. Then switch back to Reference Manager and choose Manuscript from the Bibliography menu. The Bibliography Information dialog box appears.



Source Manuscript File. Click in the text box and type the full path and file name of your source manuscript. You can also search for the file by clicking in the text box and then clicking **Browse** to locate and select your original manuscript document.

Bibliography File. When you enter or change the Source Manuscript File, the file name in this field is automatically updated to reflect the name of your source manuscript file. The default appends "RF" to your source manuscript name. This file is the bibliography reference file that will be generated. (This field is only available when you select the output device to "Disk.")

New Manuscript File. The file name in this field is also automatically updated to reflect the name of your source manuscript file. The default appends "FN" to your source manuscript name. This new manuscript is the "final" manuscript that is generated and includes the proper citations required for the journal format specified. This file is only generated if Journal Format is selected for the Output Format, as described below, and when you select Disk as the output device.

Device. Select where you want the bibliography to be output. If you want the bibliography sent directly to a printer, select Printer. If you want the bibliography stored in a disk file, select Disk. When Printer is selected, only a bibliography is generated and printed — the final manuscript is created when you select the Output Device as Disk.

Additional field(s). This field becomes available when you choose a journal format or the full format as the Output Format. Check the appropriate boxes if you want any of the additional fields included in the bibliography. (If an additional field is already specified in the journal format, then that field is only included once in the bibliography.)

Output Format. Select the format in which the references should appear. The options are:

Full. This is a generic bibliography-style format.

MEDLINE. This is the "tagged field" format used by the National Library of Medicine. It is useful if, for example, you are transferring references to a colleague who uses other bibliographic management software that can import this format. You may output the references to a text file in MEDLINE format so that your colleague can import this file (as though it had been downloaded from MEDLINE).

RIS. This is a "tagged field" format, similar to MEDLINE (described above) which allows for all possible Reference Manager reference types, not just journal references.

Journal format. This option allows you to select a format that has been defined for a specific journal.

Journal Format. If you selected the Output Format to be Journal Format, then you must also specify the journal format to use. Click in this text box and then click **More/Edit** to display available journal formats. The journal format can be one you have defined or one provided with this demonstration program.

Sorting. Choose None (the default) if you want to use the sort order that is specified in the selected journal format. (If you are using an output format other than Journal Format, this will be the order of references as they are cited in the source manuscript.) Click the scroll arrow to display the list of available sort options. The options available are None, Periodical, Pub Date 1 Ascending, Authors 1, Pub Date 1 Descending and Ref ID.

Default Word Processor. The word processor displayed for this option is the word processor that you selected when you set your Output Settings (from the Utilities menu). If you have not yet selected your word processor, or if this default word processor is not your word processor, click **Output Settings** to change it.

When all entries in the dialog box have been made, simply click **Generate** to create the bibliography (and final manuscript, if a Journal Format is used). Messages appear to inform you of the progress and to notify you when the process is complete. Your original manuscript remains unchanged, and the new file or files are created with the names and locations you provided.

Check your references

Now return to your word processor and load the final manuscript and bibliography (they can also be merged if you want, using your word processor's commands). Check that all your references are correct (it is easy to transpose two digits of a reference number, and your article on cancer might contain an out-of-place citation to an article on *in vitro* fertilization). It is also possible that a reference was entered into the database with a misspelled word in the title or an incorrect year.

You can use your word processor to format the final manuscript and bibliography — single spaced or double spaced, justified margins or left flush margins, and so on. The formatted document can now be printed out and sent to a publisher.

Congratulations!

You are now an experienced Reference Manager user. Take some time to fully explore other features of the program. You can continue to add references to the sample database. You can access it, or any database you create, for a total of 50 times. Your database(s) is fully compatible with the actual version of the Reference Manager program when you purchase it. Reference Manager for the Windows™ operating system allows you to have one main database of up to 65,000 references, and any number of additional databases of up to 200 references each.

If you have questions about using the program, or when you want to order a copy of the Professional Edition of Reference Manager for the Windows™ operating system, please feel free to contact any member of our Marketing department at the address or phone number on the back cover of this instruction booklet.

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